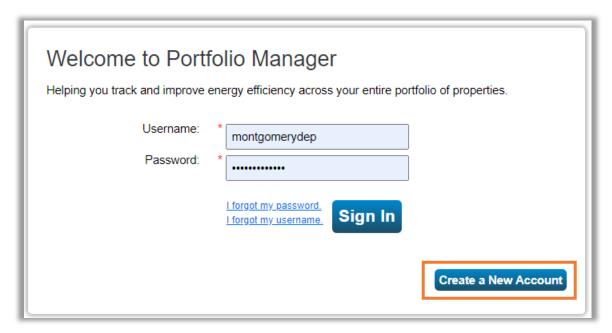
How to Report Energy Benchmarking Data to DEP

Thank you for complying with the Montgomery County Energy Benchmarking Law. The below outlines the basic steps to enter and report required energy data to the Department of Environmental Protection (DEP) each year. DEP is available for technical support, questions, and troubleshooting. If you run into any problems or need hands-on assistance please contact us at energy@montgomerycountymd.gov or 240-777-7707.

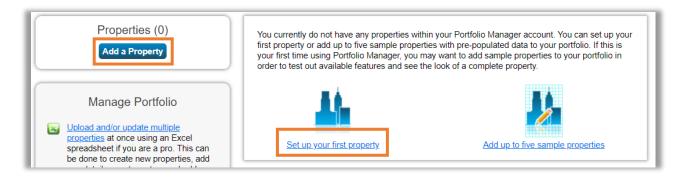
1. Create a Portfolio Manager Account

Visit https://portfoliomanager.energystar.gov/pm/home and create a new account. Be sure to record your username and password. You will need to log in to add data to each of your properties every year.

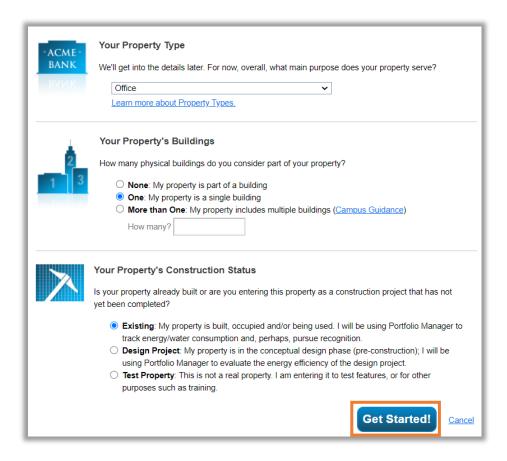


2. Add a Property

Set up the first property you want to benchmark. Click "Add a Property" or "Set up your first property" from the home screen.

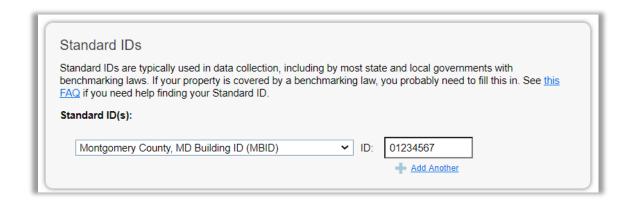


Select your property type. If you're not sure what your property type is, Portfolio Manager can help you <u>Identify your property type</u>. Enter number of buildings. Select "existing" for property construction status. Click "Get Started!"



Enter your property name, address, and gross floor area. An estimate of your building's gross floor area is available on the <u>Covered Buildings Inventory</u>, but this number should be confirmed with building records. Inputting an accurate gross floor area is <u>critical</u> to benchmarking properly, as the gross floor area is used in calculating all key energy performance metrics.

Pick "Montgomery County, MD Building ID (MBID) from the drop down and enter your MBID number. It must be entered exactly as it appears on the <u>Covered Buildings Inventory</u> (including the leading zero where applicable, e.g. 01234567 NOT 1234567). Your MBID can be found on the Covered Buildings Inventory.



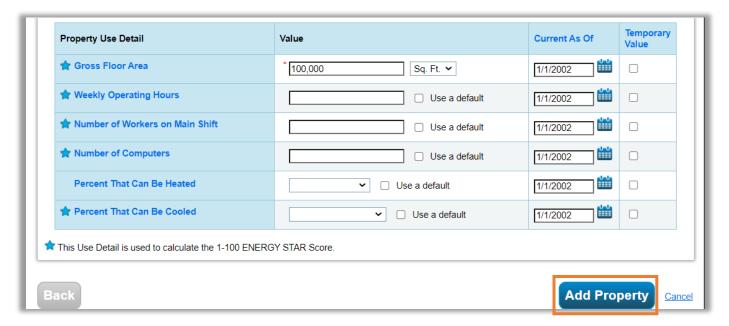
If you have a building spanning multiple tax parcels, <u>contact us</u> for guidance on which MBID to use in your submission.

If you are separately reporting multiple buildings on one parcel, please refer to the Covered Buildings Inventory for each building's ID or contact us for guidance on which MBID to use in your submission.

If you are unsure about MBID # contact DEP at energy@montgomerycountymd.gov.

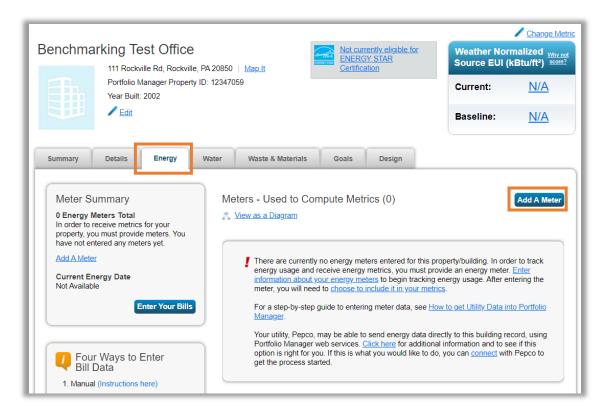
Based on the property type you selected, you will be prompted to enter different operating characteristics about the property. Here are the inputs for an office. If you are unable to obtain these details, you may select "Use a default." Checking that will disable some valuable features of Portfolio Manager such as ability to generate an ENERGY STAR score or calculate weather-normalized metrics.

Once you have entered use details as accurately as possible, click "Add Property."

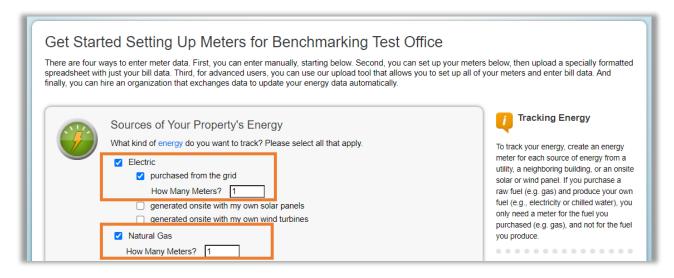


3. Add Meters to Your Property

The property has now been set up. You will see it in your property list whenever you log into Portfolio Manager. Navigate to the **Energy tab** and click "Add a meter."

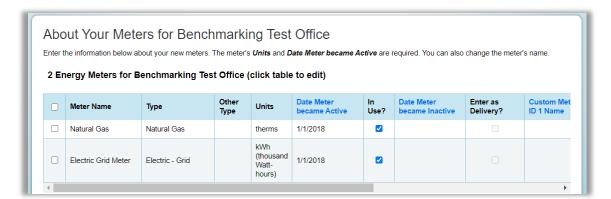


You will need to know what kind of energy sources power your building. Most all buildings have electricity, and many have natural gas servicing the property. Select the type and number of meters at the property.



Click into the table to set the units for each meter. These should match the units you are billed in on your utility bills. kWh is most common for electricity. Washington Gas provides CCF and Therm readings on gas bills. You may select either unity, but your selection must be consistent with the unit values you enter.

Set "Date Meter became Active" to at least the beginning of your benchmarking period. You will not be able to enter bills prior to the date you list here for when the meter became active. Click "Create Meters."

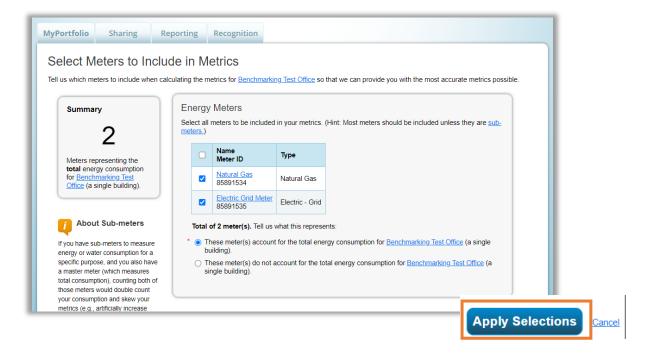




If you are ready with all of your bills, you may enter utility data as you set up your meters. We suggest continuing with setting up your meters and enter your energy bills later. You can select this option by clicking on the hyperlink at the top of the page:

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can continue with setting up your meters and enter your energy bills later.

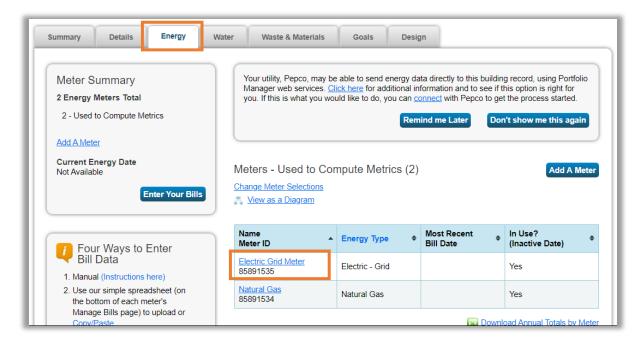
Indicate whether these meters you entered account for the total energy consumption for your property. The benchmarking law requires you to report total energy consumption. If you have not included all the meters at your property, go back to the "Energy" tab and follow the same process to "Add a Meter."



Your meters will now be visible in the Energy tab.

4. Input Energy Data

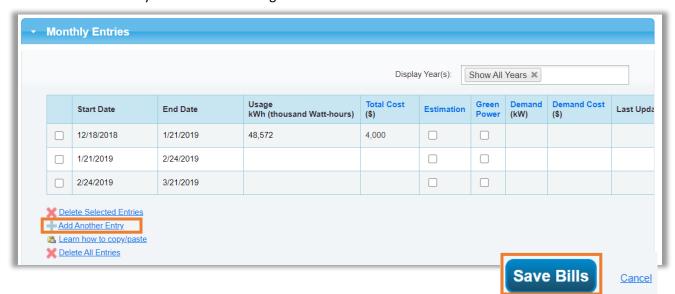
From the Energy tab, you will see a list of all the meters you created at your property. Select one of the meters to continue.



Start adding bills into the table. You must enter the Start Date, End Date, and Usage. Cost is optional. Be sure that the first bill captures at least Jan 1 of the reporting year. Also be sure that as you add bills there are NO gaps or overlaps in your dates. This will cause an error.

Click "Add Another Entry" to keep adding bills until you have bills covering at least Jan 1 through Dec 31 of the reporting year. Be sure that the last bill captures through at least Dec 31 of the reporting year.

Click "Save Bills" when you are done entering data.



Repeat this process for all utilities and all meters at the property.

Note: Portfolio Manager provide Excel upload templates. Directions for bulk-upload can be found here.

Utilities can provide aggregated data for properties with many tenants, and in many cases can automate that data to be synced with Portfolio Manager each month. For more information on this process, see Utility Specific Information under Step 1.

5. Verify Data, If Needed

Data verification is due the first year of reporting and every 3 years thereafter. If this is your first time reporting, you must have data verified. If you have reported previously, check the Property Notes field on the Details tab of the property to review previous verification details.

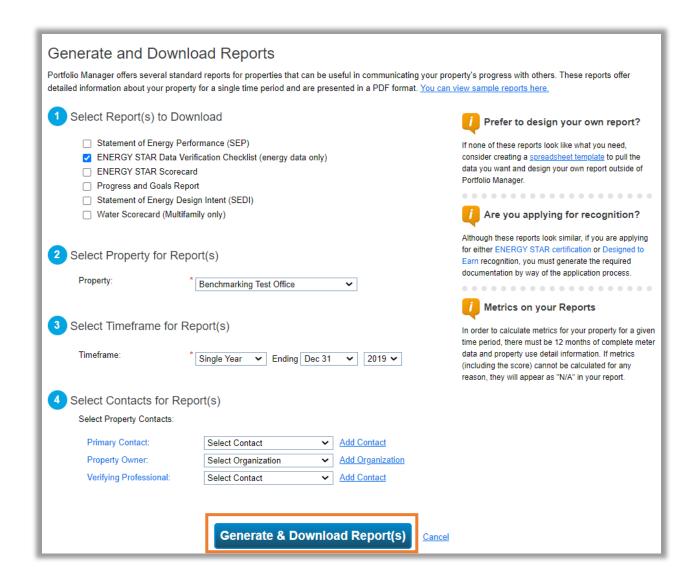
If you don't know if you are due for data verification, contact energy@montgomerycountymd.gov.

If due, a verifier who holds one of the accepted verification credentials listed in the <u>Verification Guide</u> must review the data inputs. The verifier can be an in-house employee or a third-party company. The most common credentials include Professional Engineer (PE), Certified Energy Manager (CEM), Licensed or Registered Architect, LEED AP O+M, and others.

The verifier will review the Data Verification Checklist found at the top right of the Reporting tab.



Select the ENERGY STAR Data Verification Checklist (energy data only), pick the property being verified, pick the time frame that lines up with the benchmarking year, and contacts. Then click "Generate & Download Report(s)."



The verifier will review the **Basic Property Information**, **Property Use Details**, and **Energy Consumption**. They do NOT need to review the Indoor Environmental Quality section NOR complete a site visit.

Retain a signed copy of the report for your records.

Once the verifier has signed off on the data, enter the verifier's information into the Verification fields at the bottom of the Details tab.



Verification

If you must comply with a state or local benchmarking law or other third-party program, you may also be required to verify your information. See your <u>local or state law for details.</u>

Add Verification Information

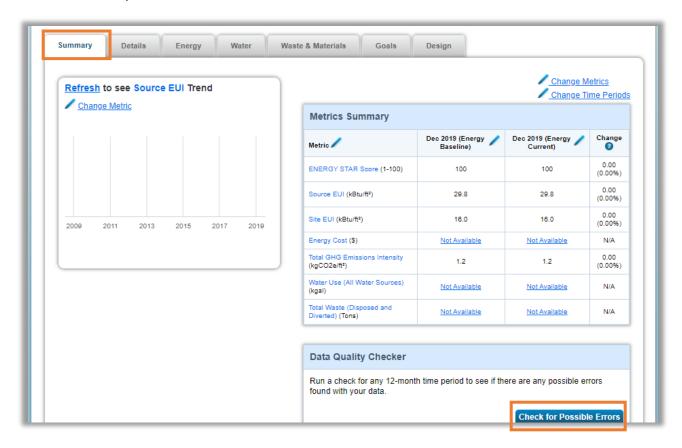
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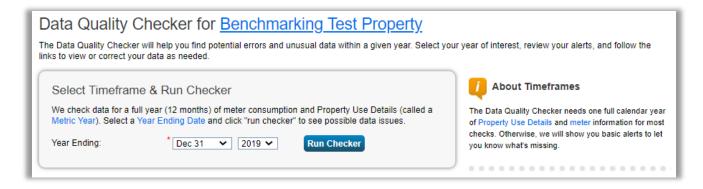
6. Run the Data Quality Checker

Before submitting, we recommend running the Data Quality Checker.

From the Summary tab, select "Check for Possible Errors."



Select the reporting year and click "Run Checker."

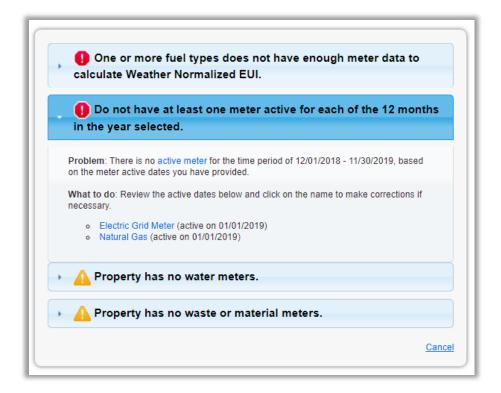


If you see any energy-related warnings, correct them before you move on.

You may ignore any water and waste or material alerts. Common issues include:

- A gap in billing periods. Ensure that there are no gaps between any of the billing dates in your energy bill entries.
- Less than 12 months of data. Ensure that you have entered bills spanning all of the benchmarking calendar year from Jan 1 Dec 31.

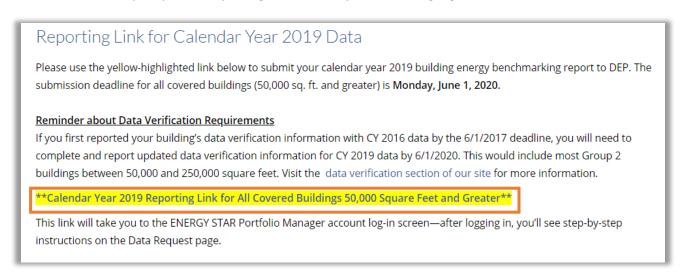
- Estimated energy data. Ensure that you have entered actual consumption data for all bill entries.



7. Submit Data to DEP

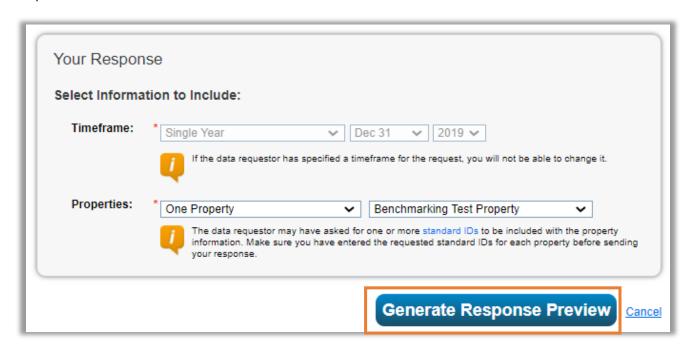
When you are ready, you must visit the reporting link which is always posted on DEP's energy benchmarking page at: https://www.montgomerycountymd.gov/green/energy/benchmarking.html.

Click the link for the year you are reporting. The current year will be highlighted:

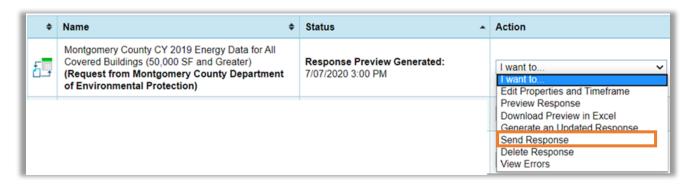


The link will take you to Portfolio Manager. You may need to log in.

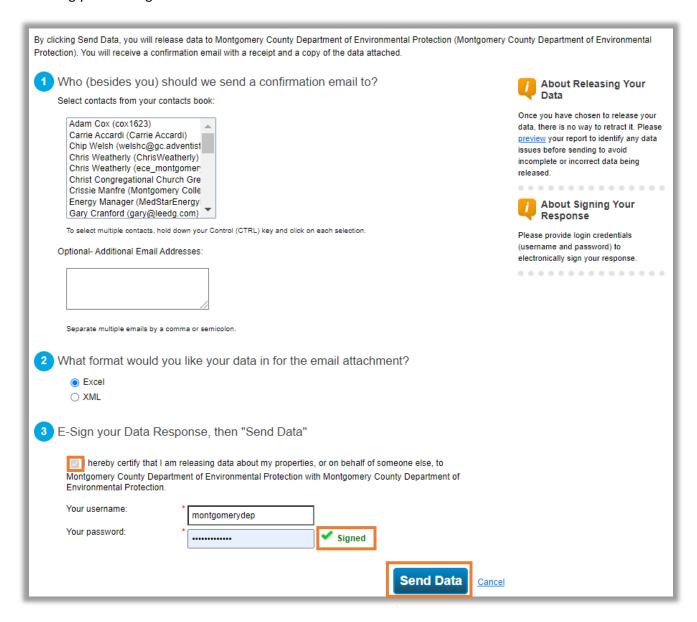
At the bottom of the reporting link page, select the properties you wish to submit. Click "Generate Response Preview."



You will be returned to the Reporting tab and will see a new entry in your report list. You must select "Send Response" from the Action menu:



Select who should receive a confirmation from your contacts, or enter their emails. Check the box to certify that you are releasing your data to DEP and click "E-Sign Response." You will then see a green check box indicating you have signed the document. Click "Send Data."



That's it! If you want to double check that we have received your report you may email energy@montgomerycountymd.gov. Annual energy benchmarking reports are due by June 1st each year.